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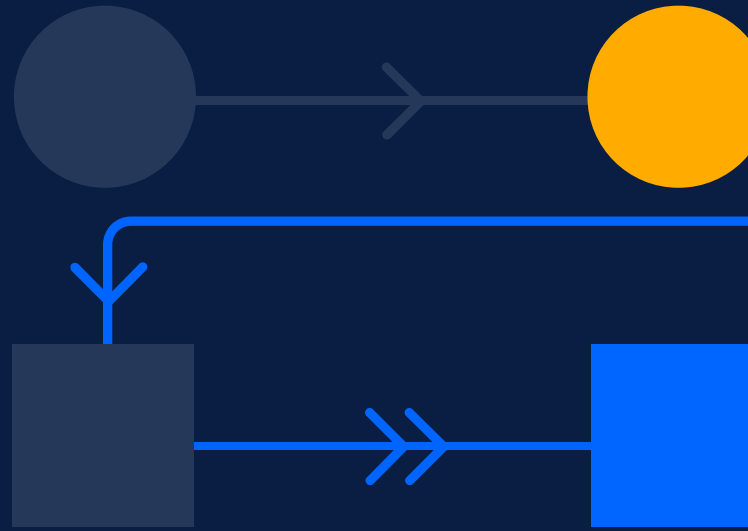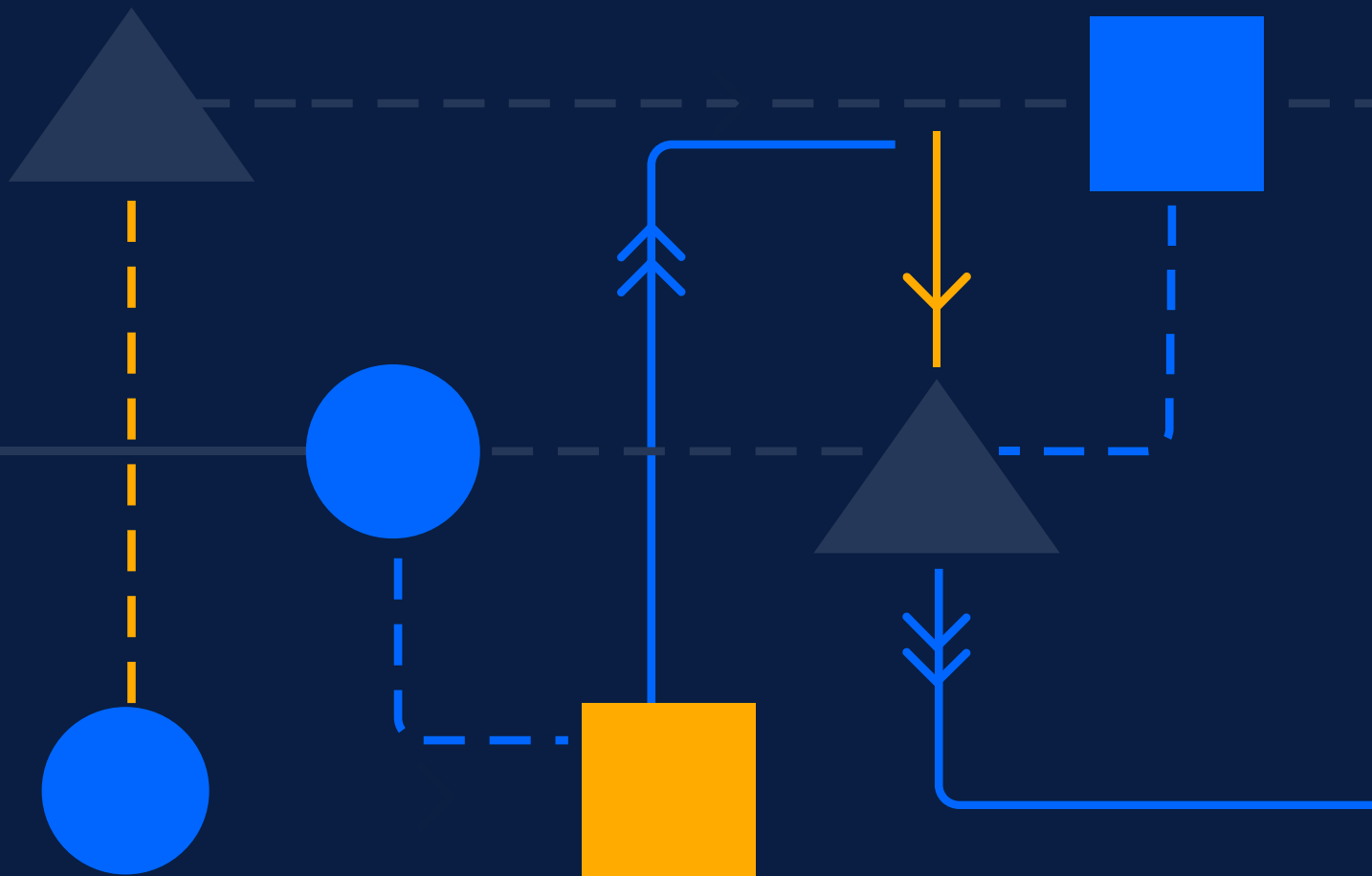
Data Migration Guide

Step-by-step guidance (and tips from experts) for moving your Atlassian instance to the cloud

Contents

Why read this ebook

Migrating to the cloud is the professional equivalent of adventure travel. There are bound to be a few bumps along the way, but nothing you can't handle with the right mindset and some preparation. And in the end, the destination is worth it. When Atlassian surveyed customers who had recently migrated, 89% said they realized the benefits of moving to the cloud in under 6 months (Source: TechValidate survey of 300 Atlassian users).

> This guide is designed to help you navigate the prep work that will make your migration adventure as smooth as possible, and choose the path that's right for you when you come to a fork in the road.
> You'll also get tips for successfully administering, optimizing, and scaling your cloud instance once your migration is complete.

By the time you're done reading, you'll understand:

- How Atlassian cloud is different and where it's headed

- The six phases of migration

- Popular migration strategies, proven by customers who've already made the switch

- How to plan and lead your migration project

- The roles and skills you'll want to have on your migration team

- Where to find additional resources to guide you through the migration and help you optimize and scale your instance afterward

This is not a step-by-step runbook for executing the migration itself – for that, contact us, your local Atlassian Solution Partner. As you familiarize yourself with the cloud migration process, know that you're not embarking on this journey alone. Our expertise is at your disposal, and we can provide you with the resources, tools, and customized solutions to support you in your journey to cloud with minimal disruption to your organization.
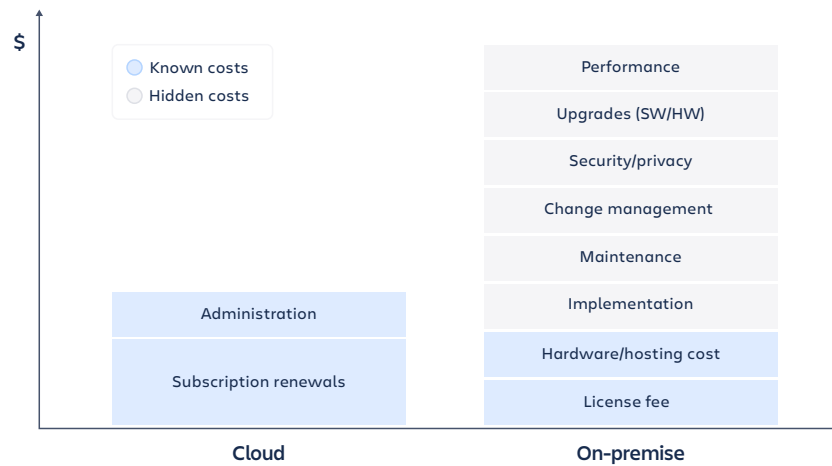
Building the case for cloud

In case you're unsure of why migrating to Atlassian cloud now is a sound decision, allow us to summarize the business case. In a nutshell, taking advantage of cloud-based tools allows organizations to:

1. Scale faster and more affordably

2. Increase profits and lower costs

3. Improve speed and performance

4. Increase team productivity

5. Future-proof against competitive forces

With disruptors lurking around every corner, both businesses and non-profits need to innovate faster and vigilantly future-proof their organizations in order to stay relevant and competitive in the long-term. Frankly, that's really hard to pull off when you have to manually update and maintain every tool that powers your workflows.

According to Forrester, three-quarters of enterprises are already in the process of shifting their infrastructure resources to the cloud, despite the known expense and effort to migrate. Why? Smaller, cloud-native competitors are steadily eating away at their market share. Cloud frees up people and resources so they can focus on supporting the business – not the toolchain. They're able to get their products and services to customers faster and adapt to changes in the marketplace with ease. And without the big cash expenditures for hardware and labor, their total cost of ownership (TCO) is dramatically smaller in the longterm.

Comparing Total Cost of Ownership

$

○ Known costs
○ Hidden costs

	Performance
	Upgrades (SW/HW)
	Security/privacy
	Change management
	Maintenance
Administration	Implementation
Subscription renewals	Hardware/hosting cost
	License fee

Cloud   **On-premise**

ℹ **Here's an example:**

After one particularly painful – and expensive – outage, Jimmy Seddon of Igloo Software realized that maintaining a self-managed server for Jira, Bitbucket, and Bamboo was going to put this growing company at risk. After calculating the cost of that four-hour downtime that impacted 80 percent of employees across the company, he figured out that moving to a cloud service, while a big-budget line item, would be far less expensive than another outage.

How is Atlassian cloud different from server?

User management

First, user management is simpler because it is centralized. In Atlassian's cloud products, you manage user accounts at the organization level rather than product by product. This gives you visibility into all your users in one place. Groups, as well as access to individual products, are managed at the product level.

Atlassian also offers Access to expand your user management capabilities in the cloud. Access gives you peace of mind with enterprise-grade security controls and monitoring that can be standardized across all your Atlassian cloud users. For more details on Atlassian Access in the context of cloud migrations, refer to **Atlassian Access and cloud migration documentation**.

Security, compliance, and reliability

Your risk management needs are covered, too. Atlassian cloud is GDPR-, ISO, SOC-, and Cloud Security Alliance-compliant by default. In fact, 92% of IT organizations surveyed said that security is better or equal on the cloud (Source: TechValidate survey of 311 Atlassian users). Atlassian has also built right-to-be-forgotten (RTBF) controls into the platform, and with options for data residency, you can choose where user-generated content, attachments,

metadata lives without having to increase your infrastructure footprint or overhead. For more details on how Atlassian is making security and compliance a priority, check out the **Trust Center**.

Atlassian products are designed for high performance and availability and are built on best-in-class core technologies like AWS, so your organization can scale confidently and securely. All cloud products come with financially-backed uptime SLAs for Premium and Enterprise customers.

66 With cloud, I'm not waking up in the middle of the night because a node in the data center was down. That's a huge positive for me and my customers because I can ensure the best service levels possible.

LAURENT BORDIER
Atlassian admin, Lucid Motors
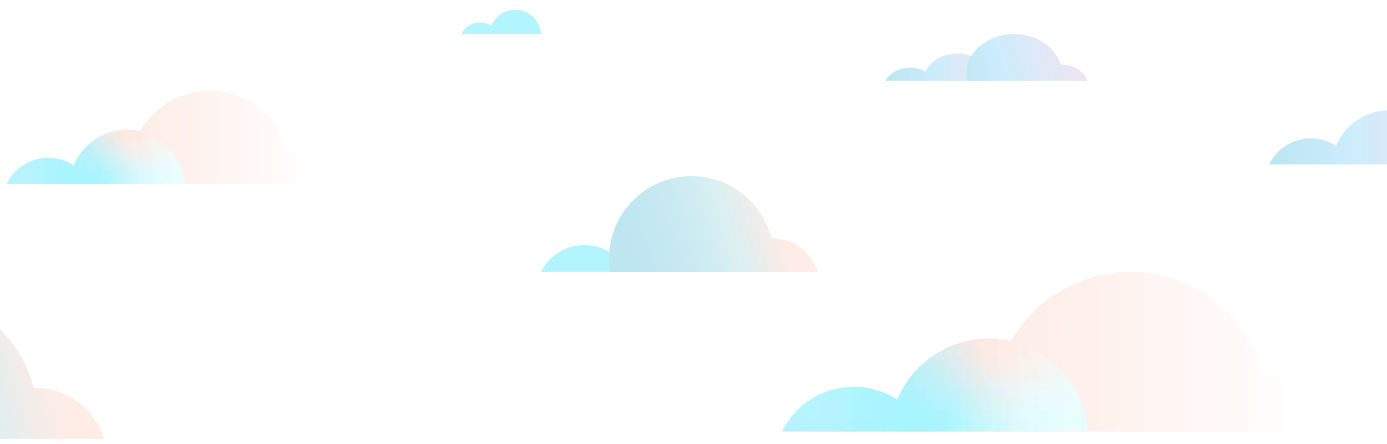
Cloud pricing and plans

Atlassian also offers a range of flexible pricing plans for cloud products that cater to teams of all sizes, from startups to enterprises. Atlassian Premium and Enterprise plans include other benefits like IP allowlisting, change management features, and access to dedicated support engineers. These tiers are tailored to meet the needs of their largest customers, as well as customers with more exacting requirements around security and user management. Most small and medium-sized organizations find Atlassian Standard plan suits their needs.

Atlassian cloud for teams of every size

FREE

<10 users

STANDARD

10+ users
All Cloud capabilities
Data Residency

PREMIUM

Standard +
Unlimited Storage
99.9% SLA
Premium Support
IP allowlisting
Sandbox
Bundled releases
Archiving Automation

ENTERPRISE

Premium +
Multiple, up to
150 instances
99.95% SLA
SAML SSO
User provisioning
Org audit log
Enterprise support
Technical advisor

⚫ **ATLASSIAN** Access

ONE SUBSCRIPTION ACROSS ALL PRODUCTS & PLANS

Apps and integrations

For those who need to customize their cloud products to suit specific use cases, a substantial collection of cloud apps is already available in the **Atlassian Marketplace**, with more arriving every week. If you'd prefer the "be the change you seek" route, take advantage of the **Forge** platform to create, test, and deploy your own scalable apps using Atlassian-hosted computing power and storage.
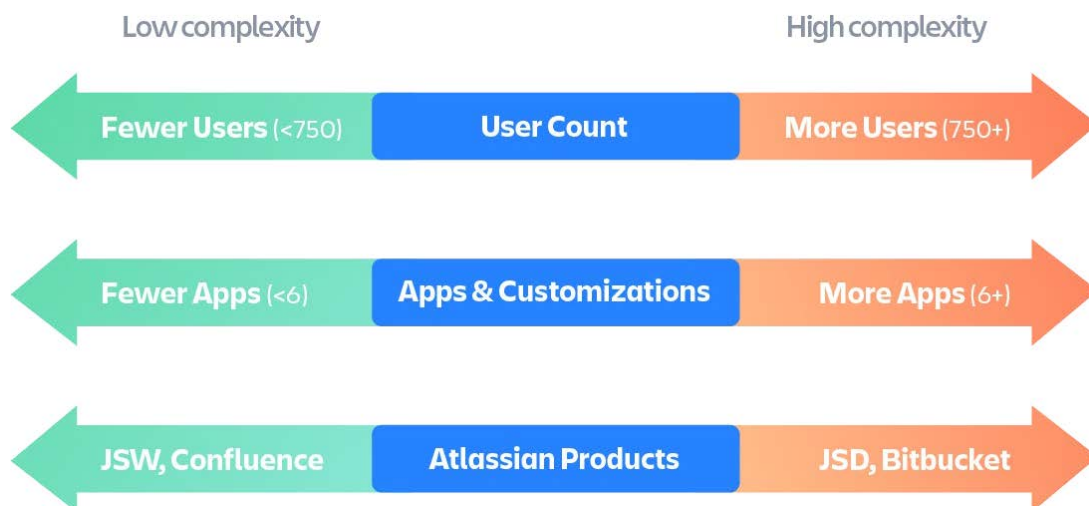
Now, that's all pretty great if we do say so ourselves. But there's more in store. To dive deeper into the differences between Atlassian cloud and self-managed, visit Atlassian **comparison documentation**.

Understanding your requirements

You've now reached the stage where you know you're going to take that trip and are ready to start planning. The first step is to define some high-level parameters: what's your budget, when do you want to go, who will your travel companions be, what gear will you need. Here's what that means in the context of moving to Atlassian cloud.

What is your timeline?

Every company's timeline will be different based on their size and unique needs. Enterprises with thousands of users and multiple Atlassian products often take 6 months to a year or more to fully execute their migration end to end. For smaller organizations and those with simpler configurations, it may be a matter of a few weeks between kicking off the project and uncorking champagne to celebrate a job well done. The more users you're supporting, and the more complex your business processes are, the longer your timeline.

Low complexity / High complexity

Fewer Users (<750)	User Count	More Users (750+)
Fewer Apps (<6)	Apps & Customizations	More Apps (6+)
JSW, Confluence	Atlassian Products	JSD, Bitbucket

To help you estimate your timeline and plan accordingly, think about the following factors and what each of them might mean for you:

1. **People:** Do you have executive buy-in? Will your Atlassian admin be focused primarily on this project, or is it something they'll have to chip away at in between other work? Will your admin be tackling this project on their own, or can they assemble a migration team? (We highly recommend the team approach!)

2. **Data:** Do you need to clean up any stale or "messy" data first? Have you customized your products and processes in such a way that data won't flow cleanly into your cloud instance?

3. **Apps:** Are all the Marketplace apps attached your server instance available for cloud? What additional apps for cloud might you plan to add once the migration is complete?

4. **Testing:** Will you need to set up a staging environment to test against? Do you have lots of complex, mission-critical processes you'll need to test before rolling the change out?

5. **Stakeholder management:** Are your end-users prepared for this change? Do you have support channels in place or other ways for them to ask questions and get answers?

What is your budget?

Although migrating to cloud will result in longterm cost savings due to lower overhead expenses, the shift to a monthly or annual subscription structure (vs. paying upfront for the full license once a year) can lead to accounting issues at the outset. Be sure to check in with a member of your finance team to understand whether and how your budget might be affected.

How many users and how many products are we talking about?

Be sure you have a clear picture of which cloud products and apps you need, and who will have access to what before moving on to the next phase of your planning. Invest the time at this stage to take stock of whether every user will still need a seat in every product they currently have (ditto for your Marketplace apps) and keep an eye out for opportunities to simplify or streamline things.

If you'll be migrating more than 1,000 users, make sure to get in touch with us, your trusted Atlassian Solution Partner for expert guidance and assistance in planning and executing your migration.

What about security, compliance, and privacy?

Your needs in these areas will help you determine which cloud plan (Standard, Premium, Enterprise) is the best fit for your organization.

Legal

Atlassian's Premium and Enterprise offerings include higher limits of liability and guaranteed uptime, financially backed by service credits. Details on both are laid out in the **Expanded Coverage Addendum**. You and your legal stakeholders can check out the **Cloud Terms of Service FAQ** for more info.

Regulatory compliance

The data associated with your cloud instance will now be Atlassian's responsibility, which has significant compliance implications. For example, Atlassian's cloud Terms of Service specifically prohibits Sensitive Personal Information, including PCI or HIPAA data. In other words, do not plan to store social security numbers, tax ID numbers, credit card numbers, or patient records in your Atlassian cloud products.

Work with your legal stakeholder to understand which regulatory standards you have to comply with. Then head to Atalssian's **compliance center** to learn more about what's covered natively and whether that will meet your needs.

Questions about compliance?

Reach out to us, your trusted Atlassian Solution Partner, and we can walk you through the details.

Privacy

Atlassian is committed to maintaining compliance with GDPR and where applicable, they institute appropriate international data transfer mechanisms by executing Standard Contractual Clauses through the updated **Data Processing Addendum**. Atlassian's **privacy policy** outlines all this information (and more) in greater detail.

Security

Security is built into Atlassian cloud products. They employ numerous controls to safeguard your data including **encryption in transit and at rest** across Atlassian cloud services, external vulnerability research such as the Bug Bounty program, and more.

The Atlassian security team approaches their work holistically with a common controls framework. Security threats are prevented using the Atlassian Trust Management System (ATMS), secure software development practices, and industry-accepted operational practices. Atlassian also performs rigorous security testing including threat-modeling, automated scanning, and third-party audits. If an incident occurs, the issue is quickly resolved using security incident response practices and keep you informed with real-time system status. For a complete run-down, get comfortable and head to Atlassian's **security practices** page.

What are your goals for migrating and how will you measure success?

There are number of reasons customers decide a move to cloud is a necessity. Especially in today's landscape where world events out of our control have impacted hundreds of thousands of businesses around the world - the ability to not just stay ahead but adapt quickly is a must have. Some common goals to consider might be:

- Reduce overhead costs to refocus time and money on more strategic initiatives

- Achieve high-growth via faster product release cycles and speeding up onboarding of new hires

- Shift full-time admins from software maintenance to higher-value projects that impact overall business goals

- Accelerate end user productivity, and support cross-team and cross-geo collaboration

- Minimize downtime and improve performance to reduce costs and instill confidence in products and services

Any (or all) of these might mean success in your eyes and the eyes of your stakeholders. It doesn't matter so much what your definition of success is. What matters is that you have one.

Who needs to be involved?

The roles needed for your migration will vary based on its complexity and your company size and resourcing available. Most migrations will involve some, if not all, of the roles below:

- A project owner who is driving the migration to completion

- An approver who makes (or signs off on) major decisions

- Project team members with specific subject-area knowledge such as database management, security or user management, contracts and licensing, as well as knowledge of how your Atlassian tools are configured. Assume that most (if not all) who administer your server instance should be on your cloud migration team.

- Stakeholders from teams like Legal, Finance, and HR, as well as those who will actually be using the cloud site(s) to help test, provide feedback, and make sure your cloud setup is meeting their needs.

Defining your migration strategy

Depending on which server version you're on and what tools you choose to work with, your actual migration method and strategy will vary.

Considerations around migrating core data

Atlassian's Cloud Migration Assistants for **Confluence** and **Jira** will help you move projects, content, users, and groups from your self-managed license to cloud without disrupting your teams. With the assistants, choose what you want to move to the cloud, start migrating at your convenience, and monitor progress throughout your migration.

The Cloud Migration Assistants also come in handy when you want to assess your server app availability in cloud, find out whether there's an available migration pathway for your app, and for running test migrations before doing the real thing.

If you're interested in a cloud to cloud migration to consolidate your sites, or need to migrate data from Jira Service Management Server (formerly known as Jira Service Desk) or Advanced Roadmaps (formerly known as Portfolio for Jira) to your new cloud site, then it's a great time to connect with your local Solution Partner.

Contact us today to lean on our team of experts, so you can continue to focus on driving value to the business.

Considerations around user management

There are several ways to migrate users, depending on how you've been handling user management in your on-premises products and what your needs will be going forward.

While some organizations choose to manage users "by hand", others choose to add Atlassian Access to their collection of cloud products for tighter (and easier) controls around password policies, admin logs, unified user management and 2FA, API controls, and SAML single sign-on. **Take a look at this documentation** to identify your current server setup and what Atlassian recommends when you migrate to cloud.

> **i** 85% of surveyed IT organizations said that user management is better or equal on the cloud.
>
> Source: TechValidate survey of 311 Atlassian users

Access customers can be migrated using the **SCIM provisioning feature**. For customers without Access, Atlassian recommends using the Cloud Migration Assistants mentioned above. These tools do the heavy lifting on user migration, as well as perform pre-migration checks that identify invalid emails, duplicate users, and other bits of "clean up" to do before migration so rolling cloud out to your end-users goes as smoothly as possible.

A few other questions to answer before proceeding:

- Are you currently using the same user directory for all your server products?

- If you're using externally managed users, what identity provider is holding that data now?

- Who originally set up user management in your current system? (If it wasn't you, be sure to involve the person who did or a server admin who can confirm how the users and groups are configured and how that should be taken into account for migration.)

What about apps?

A strong app migration plan starts with understanding your current server app and integration landscape. Audits are a good tool to help you do this and determine what course of action to take during your move. Some of the basic questions you'll need to answer include:

- What apps do you currently have?

- What are they being used for, and by who?

- Are they essential?

- Are similar features or app alternatives available in cloud?

- How do costs compare between server and cloud?

Chances are you have a lot of apps. Maybe you inherited an instance from a previous admin that includes up to 30+ apps (that's a lot, but it happens!). Think of your migration as an opportunity for spring cleaning.
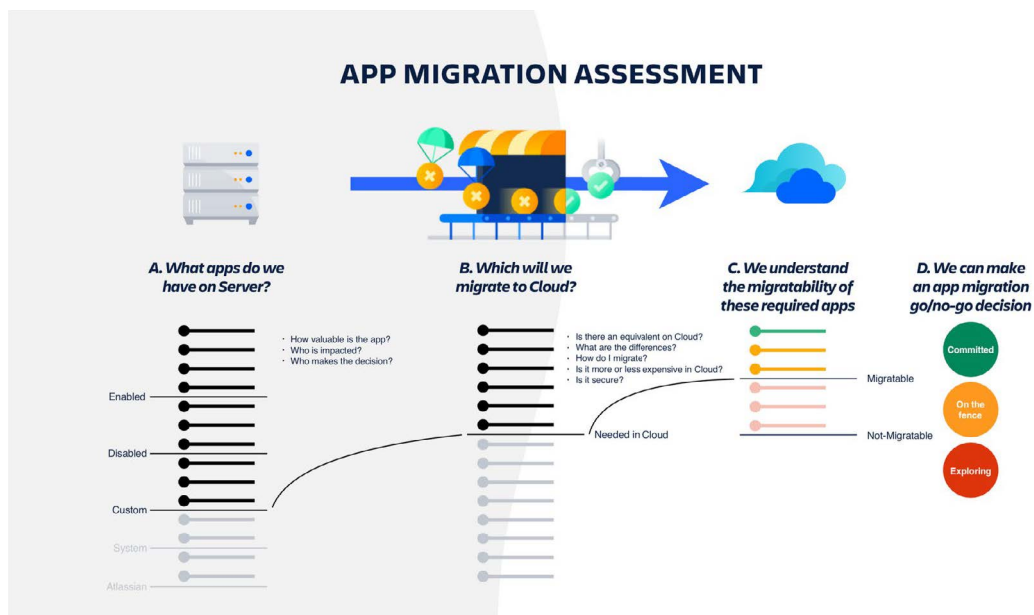
Apps are an essential part of any migration discussion, and it can be daunting to those who don't have the time to review and migrate app data. That's where we come in! As a certified Solution Partner, we have the expertise to help assess your current suite of apps, perform an audit to determine the best way to migrate, or explore how to migrate to a similar but alternative cloud app.

Assessing your migration complexity

The more complex your migration, the longer it's going to take to plan and execute. And depending on budget and resourcing, you may be more inclined to bring in a dedicated Solution Partner to help. The complexity of your migration will be based on a few primary factors:

1. **Size:** This includes the size of your data, as well as the number of users. A small site with only a few gigabytes of data and under 1,000 users will be much easier to migrate than a site with hundreds of gigabytes of data and thousands of users, both from a data migration and downtime perspective, and overall planning.

2. **Apps:** This includes both the **number of critical apps you have**, whether they're available in cloud (or have alternatives), and whether they have migration pathways.

3. **Customization:** This can include custom fields, non-Atlassian integrations, custom apps, and unusual data structure.

4. **Number of products:** The more products you have to migrate, the more complex your migration will be. For example, a Jira Software only migration is simpler than migrating both Jira Software and Jira Service Management.

5. **Consolidation:** If you are consolidating multiple sites, rather than simply migrating into a new site, this will increase complexity as data, apps, and users need to be reconciled. In general, the greater number of consolidations required, the greater the complexity.

6. **User management:** A few factors can increase complexity here, including the need for Atlassian Access, the number of anonymous users, the number of inactive users, and use of multiple identity providers.

Optimize and shift `RECOMMENDED`

An "all at once" migration where you assess which data to migrate to cloud and which to leave behind on your server instance for future reference in a read-only state.

BEST FOR

Medium-complexity customers and/or customers with 2,000 - 10,000 users

PROS

- Everything is migrated at once

- Only migrating what you need

- Shorter overall migration timeline and reduced migration downtime

- Will make cloud simpler for your teams to navigate

- May improve cloud performance

- May decrease costs to migrate (e.g. resourcing, Partner costs) due to protracted timeline

CONS

- All users will need to be onboarded simultaneously

- May increase downtime depending on the size of your data

- Requires additional planning and work to determine how to optimize

Lift and shift

Take all of your data - product data, users, and apps - and migrate it to cloud in a single migration.

BEST FOR

Low-complexity customers with fewer than 2,000 users

PROS

- Everything is migrated at once

- Shorter overall migration timeline

- May decrease costs to migrate (e.g. resourcing, Partner costs) due to protracted timeline

CONS

- All users will need to be onboarded simultaneously

- May increase downtime depending on the size of your data

- May be moving unneeded data and users to cloud, which can increase costs

Phased

Migrate data in stages, rather than all at once. As you complete each migration, issues can be worked out and users onboarded and trained in small chunks.

BEST FOR

High-complexity customers and/or customers with more than 10,000 users

PROS

- Phased user onboarding
- Reduced single downtime
- Allows you to clean up and optimize over time
- Gives users a chance to adapt to new ways of doing things

CONS

- Not well supported if you need to migrate Jira Service Desk or Advanced Roadmaps (formerly known as Portfolio)
- Longer overall migration timeline may lead to increased costs
- Can be more complex to manage multiple deployments during the transition
- Requires careful planning, since dependencies must be mapped out

Start fresh

If you're confident you won't be working with the majority of your existing server project data going forward, or want to work in cloud immediately, then you may choose the start fresh approach to setting up your cloud site.

BEST FOR

Low-complexity customers, customers with few users or new teams

PROS

- No or limited migration downtime

- If you have a server license, you can keep the data around for archiving purposes

CONS

- Users will not have access to old project/ space data

The important thing is to understand all the advantages and inconveniences of each approach, and at the same time, realize that you need to choose the one most suitable for your organizations' specific needs. The truth is, really complex migrations may involve some mix of lift and shift, optimization, phased. But the right balance depends on your budget, your timeframe, and your risk threshold.

Planning and preparing for your migration

Once you have an understanding of your requirements, it's time to get familiar with the phases of migration and build out your project plan: specific steps, estimated timelines, dependencies, and owners for each task.

Migration tools

If you haven't already signed up for a free cloud migration trial, we can help get you started! Connect with us today for more details. Atlassian's cloud migration trials match the user tier and remaining duration of maintenance (for up to 12 months) of your self-managed license so you can poke around in Jira and Confluence Cloud and plan the details of your migration.
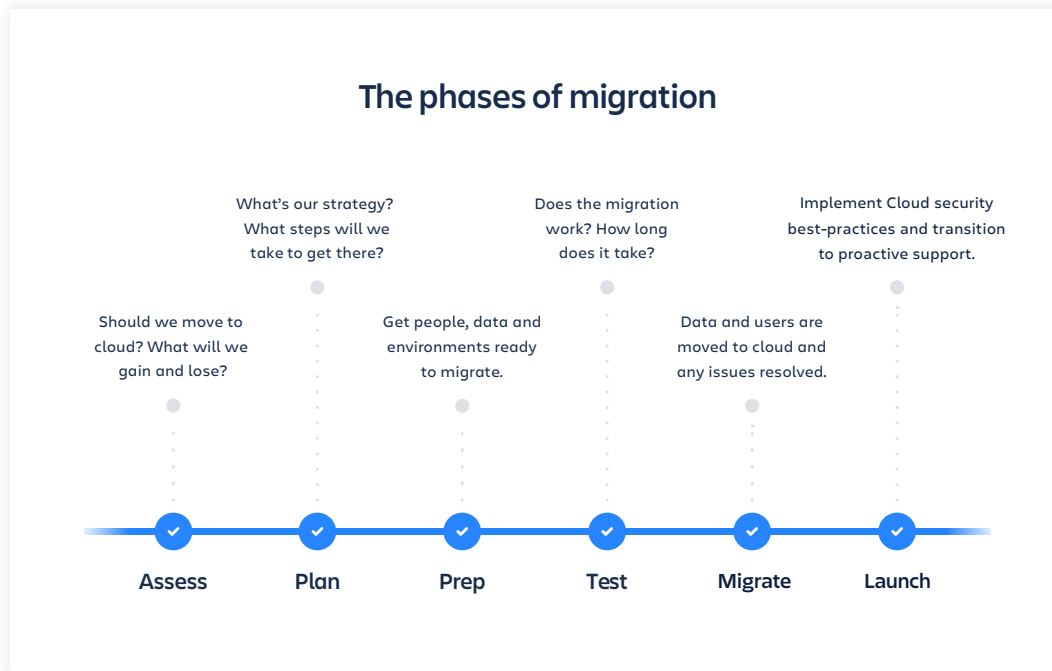
Atlassian has also created also created **Cloud Migration Assistants for Confluence and Jira**, which are free Marketplace apps, built and maintained by Atlassian. The assistants help you move projects, content, users, and groups from server or Data Center to cloud without disrupting your team, and help you assess your current server apps and app availability in cloud. Along with activating your free cloud migration trial, we also suggest downloading the assistants as part of your first steps.

Have questions?

No cloud migration journey is one-size-fits-all, but don't worry, you're not in this alone. Lean on our expertise to help assess, plan and execute your migration - freeing up time for your team to focus on what really matters.

The cloud migration journey

There are six phases in a cloud migration, some of which you may have already started on as you've made your way through this guide. The move to cloud isn't always linear and conversations with stakeholders happen out of order - these phases are meant to provide a flexible structure so you know you're heading in the right direction.

The phases of migration

What's our strategy? What steps will we take to get there?

Does the migration work? How long does it take?

Implement Cloud security best-practices and transition to proactive support.

Should we move to cloud? What will we gain and lose?

Get people, data and environments ready to migrate.

Data and users are moved to cloud and any issues resolved.

Assess   **Plan**   **Prep**   **Test**   **Migrate**   **Launch**

The table above provides a high-level overview to help you stay ahead and on track with your migration. Each of these phases present several key tasks and objectives that must be completed before moving on. Remember, every organization's cloud migration is unique - there is no one-size-fits-all template.

When you need a Solution Partner

If you've got a complicated migration on your hands – or if your team has never done a cloud migration before – bringing on a Solution Partner can make all the difference. Several customers - at large and mid-sized companies - have benefitted from working with qualified experts in planning and executing the finer details of their cloud migration. Here's a checklist to help you consider when to use the help of a Solution Partner:

- ☑ Limited internal resources to help with this project
- ☑ You need help with things outside of the scope of Atlassian support, including User Acceptance Testing, server upgrades, or user training
- ☑ You need help with migration project management, planning, and execution
- ☑ You have a complex merging scenario
- ☑ You need to migrate five or more business-critical apps
- ☑ You have specific security and compliance needs
- ☑ You need to migrate over 1,000 users

We offer end-to-end migration services, or can build a custom package for you to suit your enterprise needs. Get in touch with us for pricing and details.

Managing your new cloud products

Think ahead to that glorious day when your cloud migration is complete. You've celebrated with your team, taken a well-deserved day off, and come back to work with a satisfying feeling of accomplishment. So what's next? Read on for best practices and tips on how to manage your new cloud products post migration.

Building your cloud admin team

Moving to cloud creates an opportunity for people in certain legacy roles. Some once-niche jobs are now critical to solving new challenges. Other positions remain essentially the same, but with expanded responsibilities. For example:

- Most roles must lean more on their abilities to manage capabilities and integrations, or develop those abilities if they lacked them before the cloud transition.

- Focus shifts from hardware to soft skills, and to managing end-to-end capabilities rather than engineering the individual steps along the way.

- Security requirements are different and relationships with vendors change, as do the types of skills that are most valued.

- Roles like solutions architect and enterprise architect, which focus on stitching together external cloud services, just got a lot more important.

- Infrastructure roles such as network administrator, database administrator, and storage administrator, have to re-calibrate their skills for cloud and deal with more layers of automation.

With cloud tools, security updates and feature improvements happen more often and automatically. So staying current is largely a matter of staying on top of the changes, being aware of what features and updates are in the works, and understanding how they'll affect your end-users, rather than physically maintaining the infrastructure and software. While this does require some time and people skills, it's typically less time-consuming than on-prem stack management.

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